



## Identifying Less Active LOA Lists



### Introduction

As a Travel Manager, you are encouraged to promote travel in MyTravel. Here is how you can identify the organizations that are using MyTravel and those who are not taking advantage. This Travel Tips and Tricks details steps on how to pull a report then manipulate the data to identify organizations requiring attention from Travel Managers to encourage more participation in MyTravel.

### Noteworthy Information

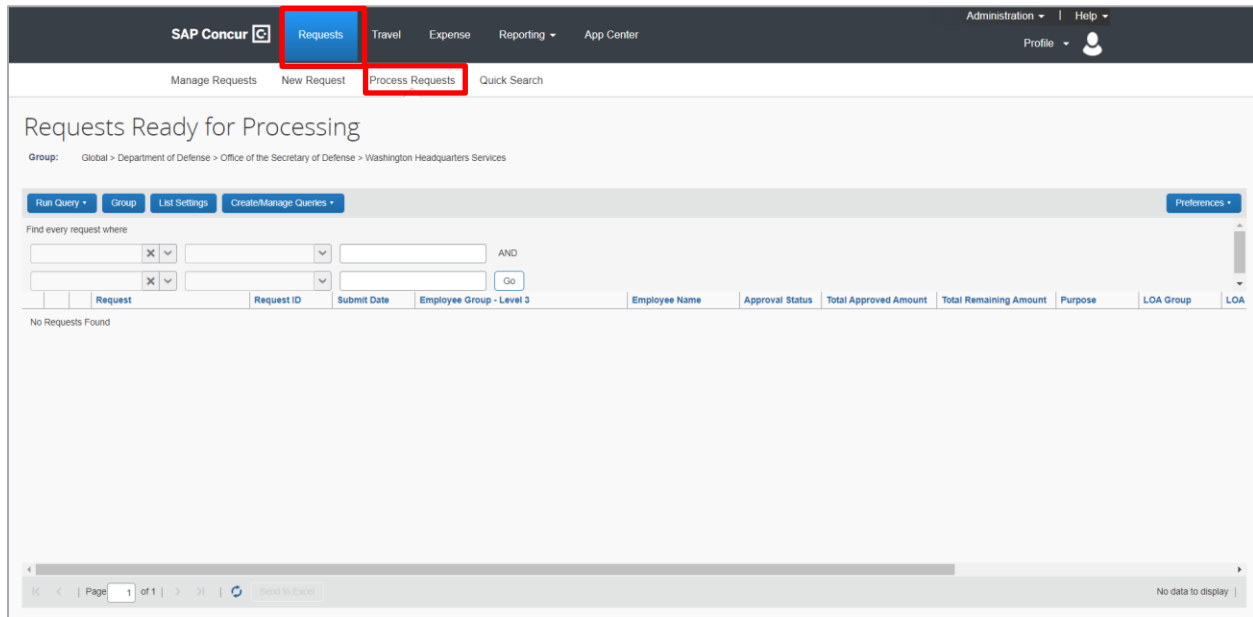
- Travel Managers are responsible for encouraging and managing travel for designated organizations
- Travel Managers must have access to Request Administrator (also known as Request Processor) in order to pull the report
- DTMO assigns permissions to users in MyTravel – send an email to [dodhra.mc-alex.dtmo.mbx.dtmo-concur@mail.mil](mailto:dodhra.mc-alex.dtmo.mbx.dtmo-concur@mail.mil) requesting access to Process Requests

### Scenario

I am a Travel Manager in search of a report that will tell me who is versus is not using MyTravel. How can I run a report to target the groups needing more participation in the prototype?

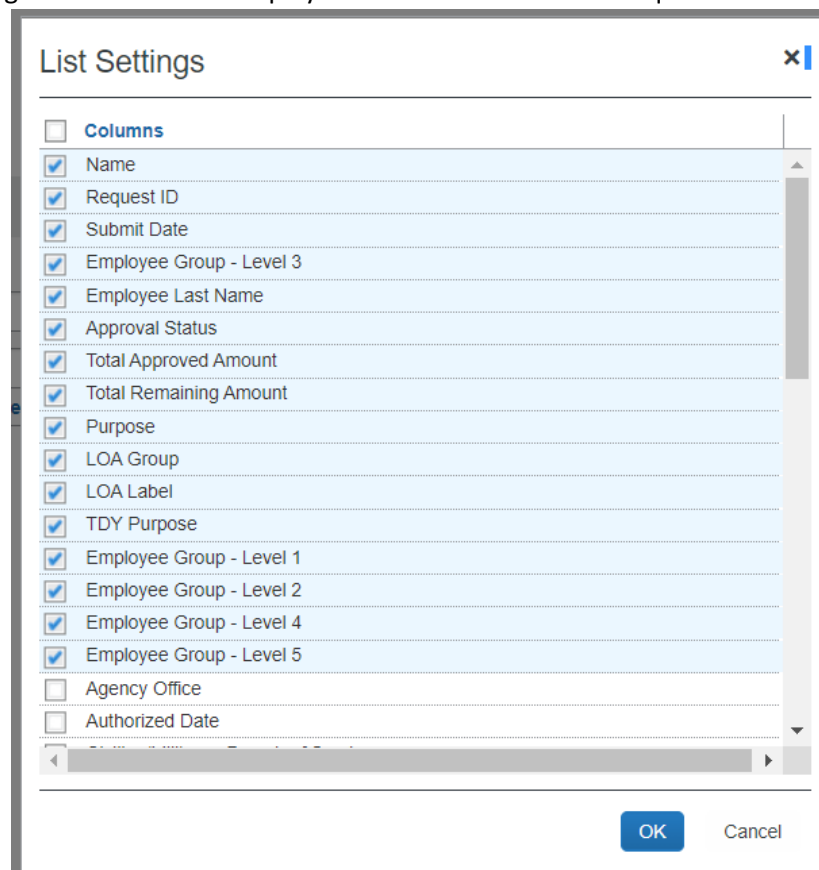
## Pulling the Report

1. Select **Requests** in the upper left corner next to SAP Concur, then select **Process Requests**



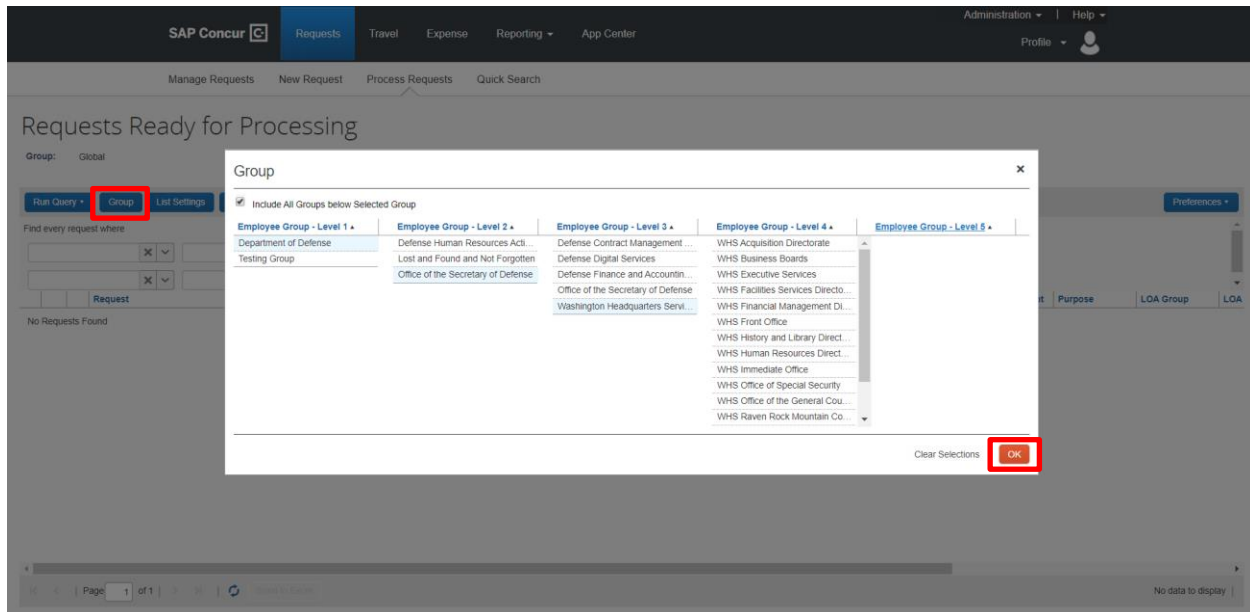
2. Select **List Settings** and verify you have the options below selected.

**NOTE:** The List Settings control the data displayed in columns in Process Requests



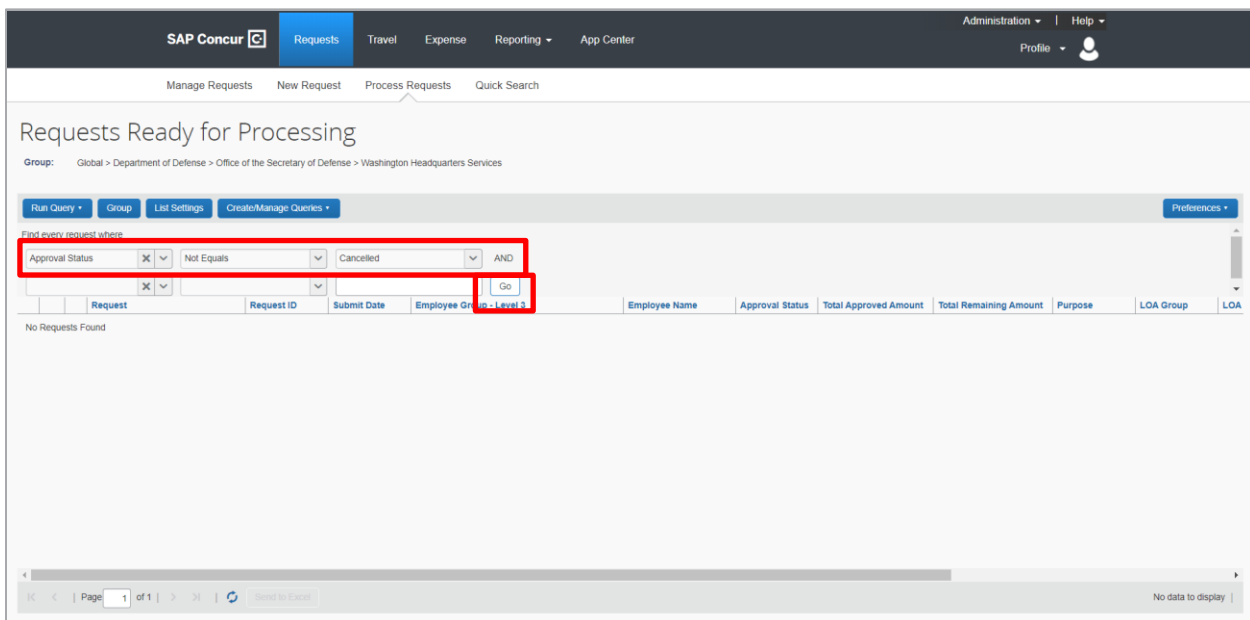
3. Select Group then select your Employee Group – Level 1, Employee Group – Level 2, and Employee Group – Level 3. Then select Ok.

For example, DTMO select Department of Defense (**Employee Group – Level 1**), Defense Human Resource Activity (**Employee Group – Level 2**), Defense Travel Management Office (**Employee Group – Level 3**).

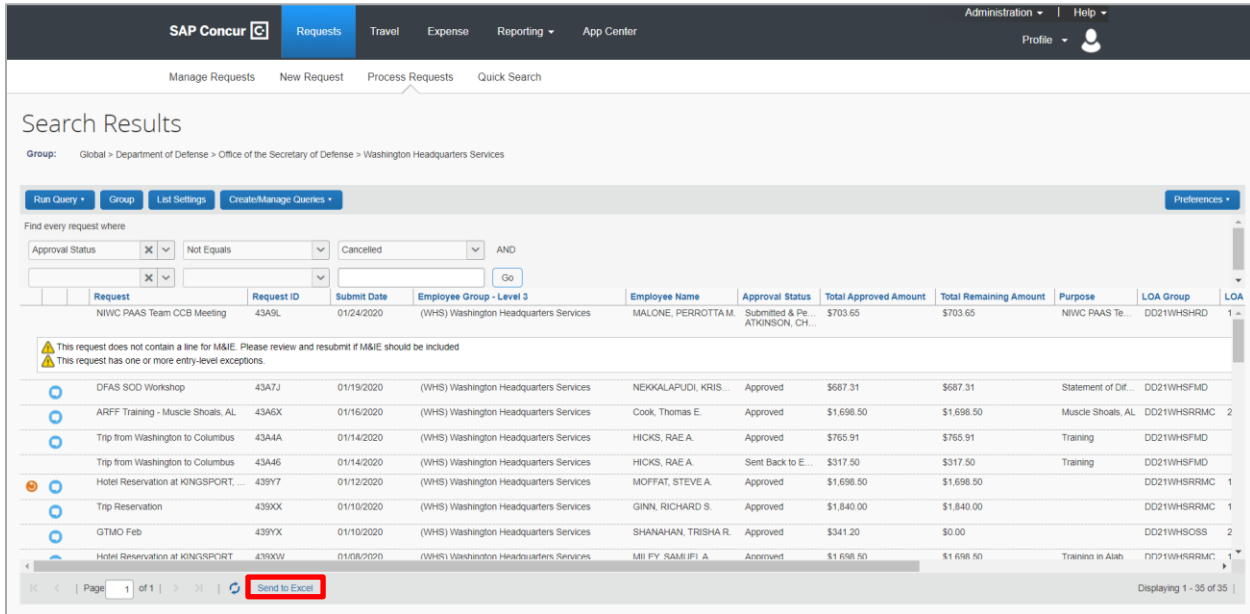


4. Apply the following filter to your query to ensure you only pull active requests (no cancelled documents). Then click Go.

**FILTER:** Approval Status Does Not Equal Cancelled



- Once your results return, select **Send to Excel** at the bottom of your screen.



The screenshot shows the SAP Concur 'Search Results' page. At the top, there are navigation tabs: 'Requests', 'Travel', 'Expense', 'Reporting', and 'App Center'. Below these are sub-tabs: 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'. The main heading is 'Search Results'. Below this, there's a filter section with 'Run Query', 'Group', 'List Settings', and 'Create/Manage Queries' buttons. A search criteria section allows filtering by 'Approval Status' (dropdown), 'Not Equals' (checkbox), and 'Cancelled' (checkbox). Below this is a table of search results. The table has columns: Request, Request ID, Submit Date, Employee Group - Level 3, Employee Name, Approval Status, Total Approved Amount, Total Remaining Amount, Purpose, LOA Group, and LOA. The first row shows a request for 'NIWC PAAS Team CCB Meeting' with Request ID 43A9L, submitted on 01/24/2020, for employee MALONE, PERROTTAM. Below the table, there's a warning message: 'This request does not contain a line for M&IE. Please review and resubmit if M&IE should be included. This request has one or more entry-level exceptions.' At the bottom of the page, there's a pagination bar showing 'Page 1 of 1' and a 'Send to Excel' button highlighted with a red box.

- Save the report then follow the steps below to manipulate the data into a pivot table.

## Applying Pivot Tables to the Report

- Open** the file you just exported from MyTravel
- From the **Data** menu option select **Filter** to apply filters to your data
- From the **Insert** menu option select **Pivot Table** then select **Okay**
- Using the **Pivot Table Fields** navigation panel on the right hand side, drag and drop **LOA Group** into the **Rows Box** then drag and drop **Request ID** (unique identifier) to the **Values Box**.

**NOTE:** this will provide the count of Requests (unique identifier) per LOA Group.

- Next, take action!
  - If there are LOA Groups who have low number of requests but are avid travelers, they may need more push to use MyTravel.
  - If there are LOA Groups that do not appear in the report (have no active requests), then they have not requested travel in MyTravel and require attention.